merSETA

Training Committee

Implementation Guide

CONTENTS

January 2016

1. Acronyms

ATR	Annual Training Report
CLO	Client Liaison Officer
DHET	Department of Higher Education and Training
EEA	Employment EquityAct. 55 of 1998
merSETA	Manufacturing, Engineering and Related Services Sector Education and Training Authority
NQF	National Qualifications Framework
NSDS	National Skills Development Strategy
OFO	Organising Framework for Occupations
NPP	Non PIVOTAL Plan
NPPR	Non PIVOTAL Plan Report
PIVOTAL	Professional, Vocational, Technical and Academic Learning
PP	PIVOTAL Plan
PR	PIVOTAL Report
QCTO	Quality Council for Trades and Occupations
SAQA	South African Qualifications Authority
SARS	South African Revenue Service
SDA	Skills Development Act
SDF	Skills Development Facilitator
SDL	Skills Development Levy
SDLA	Skills Development Levies Act
SETA	Sector Education and Training Authority
SMS	Seta Management System
SSP	Sector Skills Plan
WSP	Workplace Skills Plan
QC	Quality Council

2. Definition

OFO	Means a skill-based classification system, which encompasses all occupations in the South African context.
PIVOTAL	An acronym that means professional, vocational, technical and academic training programmes that result in qualifications or part qualifications on the National Qualifications Framework.
Consultation	Means to discuss and take cognisance of different views, it does not mean to "negotiate" which implies bargaining in order to reach an agreement.
Designated Group	Means black people, women and people with disability.
Company and subsidiary	Means where multiple levy numbers exist and a consolidated submission is linked to the main levy number where the other levy numbers are linked as subsidiary companies.

3. Introduction

This guide will provide an overview of all aspects pertinent to enablingan established training committee to run effectively.

It will include the changes that were published in the Government Gazette Notice No 35940, published on 3 December 2012. There are two types of grants that the merSETA can/may disburse to merSETA stakeholders, namely:

- **Mandatory Grants**: This grant is paid to merSETA levy paying employers based on the submission and approval of the Annual Training Report (ATR) and Workplace Skills Plan (WSP), up to a maximum of 20% of the levy contribution. It is important that the grant policy is referred to at all times to ensure that stakeholders understand the requirements for mandatory grants. The basis of the submission of the mandatory grant is that the organisation's strategic plan is taken into consideration.

- **Discretionary Grants:** This funding is provided to the merSETA stakeholders who are providing training that addresses respective workplaces' critical and scarce skills and assists in the achievement of the merSETA commitments to the Department of Higher Education and Training and priority skills as indicated in the merSETA Sector Skills Plan.

This document is intended to be a guide that will assist all representatives within the training committee to define their roles and ensure clarity with regard to the grant claim processes.

4. Important References

The following documents are available on the merSETA website, www.merseta.org.za.

1. merSETA 2015/16 Grant Policy.

2. Skills Development Act (No. 97 of 1998), as amended.

3. Skills Development Levies Act (No. 9 of 1999).

4. Regulations published in the Government Gazette, No. 27801 of 18 July 2005.

5. Government Gazette Notice No 35940, published on 3December 2012.

5. The merSETA

Section 5of the Skills Development Act prescribes that, where an organisation is liable to pay the levy, the organisation must register as an employer with SARS in the area in which the business is situated and must indicate the jurisdiction of the SETA within which the organisation must be classified as well as the Standard Industrial Classification (SIC) code. A list of the SIC codes for each SETA can be found on the merSETA website.

merSETA (Manufacturing, Engineering and Related Services Sector Education and Training Authority) is one of the 21 SETAs established through the Skills Development Act (no. 96 of 1998). It facilitates skills development in the following sub sectors:

- Metal and Engineering
- Automotive Manufacturing
- Motor Retail and Components Manufacturing
- Tyre Manufacturing
- Plastics Manufacturing

Together the five sub-sectors comprise approximately 44 000 organisations, with a workforce of approximately 600 000.

The merSETA plays a central role in ensuring that the National Skills Development Strategy goals are met.

The main functions of the merSETA are:

- To develop and implement a Sector Skills Plan (SSP)

- To promote occupational based learning programmes that include work experience

- To administer and quality assure learning programmes

- To receive levies and pay mandatory and discretionary grants to qualifying stakeholders.

5.1.   merSETA Vision
Closing the skills gap

5.2.   merSETA Mission
To increase access to high quality and relevant skills development and training opportunities in order to reduce inequalities and unemployment and to promote employability and participation in the economy.

6. Skills Development Facilitator (SDF)

6.1. Appointment of an SDF

In larger organisations an internal training or Human Resources (HR) manager may be appointed as an SDF. In small organisations there is often no dedicated training or HR professional fulfilling this role, which normally results in the role being outsourced to a professional external skills development facilitator.

6.2. The Functions of the SDF

The functions of a SDF are to:

- Ensure that the training committee is capacitated to run effectively.

- Assist and guide the committee on the important steps that need to be taken in order to develop a Workplace Skills Plan (WSP), PIVOTAL Plan (PP) and Non PIVOTAL Plan (NPP) which is in line with the employer's Business Plan for the year and complies with the requirements of the merSETA.

- Advise the Training Committee on the implementation of the WSP, PP and Non PIVOTAL Plan.

- Assist the Training Committee to draft an Annual Training Report (ATR), PIVOTAL Report (PR) and Non PIVOTAL Plan report on the implementation of the WSP, PP and Non PIVOTAL Plan.

- Advise the Training Committee on the quality assurance requirements set by the merSETA.

- Act as a contact person between the Workplace and the merSETA.

- Serve as a resource with regard to all aspects of skills development.

- Communicate the merSETA initiatives, grants and benefits to the training committee.

It is not a requirement that a SDF has to have any formal training to practice as an SDF however the merSETA recommends that a SDF undertake an accredited training programme.

The SDF unit standards are:

- Develop organisational training and development plan (15217)

- Conduct an analysis to determine outcomes of learning for skills development and other purposes (15218)

- Provide information and advice regarding skills development and related issues (15221)

- Promote a learning culture in the organisation (15222)

- Conduct skills development administration in an organisation (15227)

- Advise on the establishment and implementation of a quality management system for development practices in an organisation (15228)

- Coordinate planned skills development interventions in an organisation (15232)

6.3. The Role and Responsibilities of a SDF

To comply with legislation, the organisation must have an appointed SDF. Only one primary SDF is allowed per organisation. If the company requires more than one, they need to indicate who the primary SDF is and that person will be responsible to ensure the accurate capturing of data.

The employer should provide the SDF with the resources, facilities and training necessary to perform the required functions.

The roles performed by the SDF are:

- Facilitator: To facilitate the development of an employer's skills development strategy and the skills needs analysis and gap analysis.

- Administrator: To complete and submit the relevant documents, mandatory and discretionary grant submissions.

- Expert: To serve as an expert resource for the implementation of appropriate learning programmes.

- Advisor: To advise the employers, employees and training committee on the National Skills Development Strategy (NSDS) and on the implementation of the WSP, PP and NPP.

- Advise the Employer and training committee of any quality standards set by the SETA.

- Keep the employer Informed on the latest developments, changes and grant payments.

7. Labour Skills Development Facilitator (SDF) or Employee Representative

7.1. Appointment of a Labour SDF/Employee Representative

Where there is a recognised trade union, the recognized trade union will choose a labour (SDF)/employee representative. Where there is no recognition agreement in place and the organisation employs 50 or more employees, the employees will nominate an employee representative to represent them.

Where there are more than two labour unions in an organisation, the labour union with the majority membership will nominate a Labour SDF.

7.2. Role of the Labour SDF/Employee Representative

7.2.1. Organisations with 50 or more employees that have a recognition agreement with labour must have a nominated labour SDF to electronically sign off on the mandatory grant and PIVOTAL plan. The labour SDF /employee Representative will actively participate in ensuring that equal and fair processes take place and act as a representative of the employees. The labour SDF/employee representative will have viewing rights to the organisation's information on the SMS.

7.2.2. The labour SDF/Employee Representative will be registered on the merSETA SMS and will be required to work closely with the primary SDF.

7.2.3. There must be evidence provided that the recognised trade union was consulted in the development of the ATR, WSP, PP, NPP, PR and NPR and there must be signed off electronically by the labour SDF/employee representative appointed by the trade union. Where there is no recognised trade union and the company employs 50 or more employees, an employee representative serving on the Training Committee assumes the role.

7.2.4. In the case of an organisation that employs 49 and fewer employees, that has a recognition agreement with a trade union/ unions in place, there must be evidence provided that the ATR, WSP, PP, NPP, PR and NPR or discretionary grant applications have been subjected to consultation with the recognised trade union/unions and the applications must be signed off electronically by the labour SDF/employee representative appointed by the recognised trade union/unions.

7.2.5. Should, at the time of submission, the labour SDF/employee representative not be available to sign off electronically; the electronic sign off page must be printed, signed and uploaded against the documents upload tab on the merSETA SMS on or before the deadline for submissions. Where difficulty is experienced with the upload function, organisations are required to submit the copy to the dedicated e-mail box (uploads@merseta.org.za) or a merSETA office, on or before the submission deadline.

7.2.6. Where there is a dispute lodged with the merSETA, such disputes will be investigated by a CLO. Disputes should be e-mailed to tradetest@merseta.org.za

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7.2.7. The Labour SDF/Employee Representative should:

- Register with the merSETA as the labour SDF/employee for the organisation
  (Refer to annexure C for the registration manual).

- Actively participate in the consultative process related to the development, implementation and monitoring of the WSP, PP and NPP.

- Engage in the consultation process of drafting the WSP, ATR, PR and NPR on the implementation of the WSP, PP and NPP.

- Verify whether the data was captured accurately, as discussed.

- Electronically sign off the WSP, PP,NPP, ATR and PR submission.

- Monitor the implementation of training as identified in the WSP and PP.

7.3. Recommended Training

It is not a requirement that a labour SDF/employee representative should have any formal training however the merSETA recommends the following accredited training programmes:

- Develop an organisational training and development plan (15217)

- Provide information and advise regarding skills development and related issues (15221)

- Promote a learning culture in the organisation (15222)

- Conduct skills development administration in an organisation (15227)

- Coordinate planned skills development interventions in an organisation (15232)

- Conduct an analysis to determine outcomes of learning for skills development and other purposes (15218)

- Advise on the establishment and implementation of a quality management system for development practices in an organisation (15228)

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8.   Roles of the Secondary SDF

To cater for users who will not be the primary SDF of the organisation and will have viewing access and be able to capture data on the WSP, ATR, PP, NPP PR and NPR, a maximum of 5 secondary SDFs may be nominated for an organisation.

In a case where the company has appointed an external SDF, it is recommended to register a secondary SDF who is an internal employee in the company. The secondary SDF will have access to the organisations information but will have only viewing and printing rights.

This secondary SDF function can be used by the owner of the organisation, head of finance or any other person in the organisation who requires view/print information. The role is similar to that of the primary SDF but they will have viewing and printing access only.

8.1.   Duties of the Secondary SDF

- Engage effectively in the consultative process related to the development, Implementation and Monitoring of the Workplace Skills Plan.

- Assist with the capturing of relevant data for the WPS, PP, NPP, ATR, PR and NPR .

- Participate in all other activities of the training committee.

It is further recommended that, in companies where multiple levy numbers exist within a group of companies or a single company where wages and salaries are paid over under two levy numbers and the submission is consolidated into one, a secondary SDF is appointed per branch where the input from the branches could be collated and fed back to the primary SDF. The relationship in merSETA terms where such an arrangement exists is known as the parent, child relationship.

9.   Levies and Grants

All organisations with an annual payroll in excess of R500 000.00 are liable to pay 1% of the total payroll in the form of a Skills Development Levy to the Skills Development Fund, that is administered by SARS.

Of the levies collected by SARS, 80% is transferred to the respective SETA which uses these funds to:

- administer the functions of the SETA

- pay organisations grants that has been approved

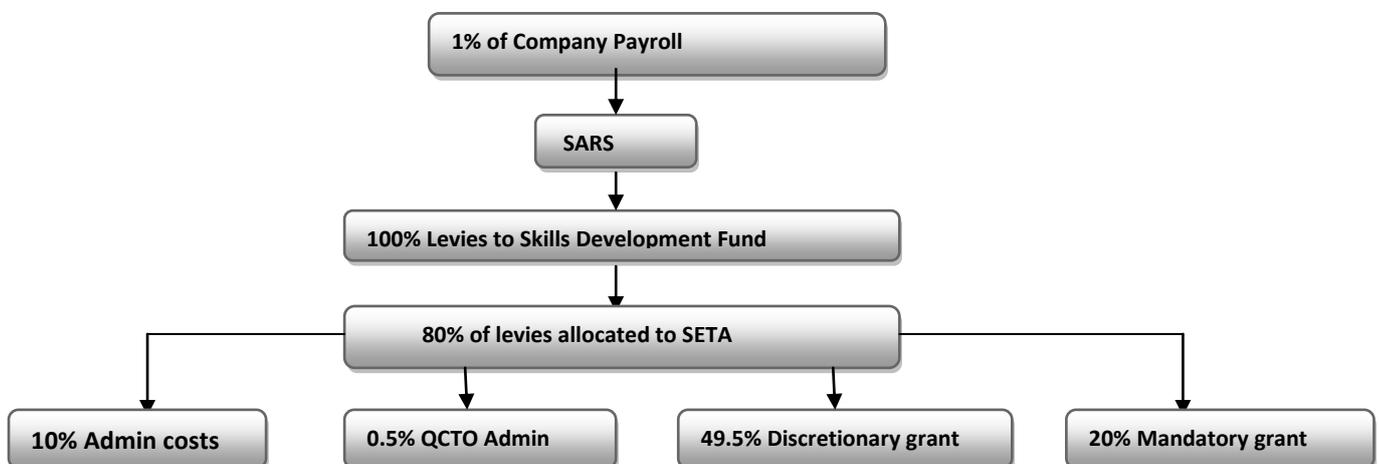- implement its Sector Skills Plan and Annual Performance Plan through the allocation of discretionary grants.

A SETA may not use more than 10.5% of total levies paid for its administration costs.

A SETA must transfer, as part of its administration costs, an amount that does not exceed 0.5% of total levies paid by the organisation to the QCTO for quality assurance functions.

Up to a maximum of 20% of all levies paid by an organisation during a financial year will be paid to an organisation that submits a WSP and ATR, based on the amount spent on training and approved by merSETA, against the criteria as outlined in the merSETA Accounting Authority approved Grant Policy.

49.5% of total levies paid by an organisation must be used by the merSETA to fund discretionary grants.

A SETA may determine and allocate discretionary grants in support of its SSP. A SETA must develop its SSP by taking account of national skills objectives set out in the National Skills Development Strategy III (NSDS III), the National Skills Accord and other relevant national priorities.

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                    │  1% of Company Payroll   │
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              │ 100% Levies to Skills Development Fund│
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              │   80% of levies allocated to SETA    │
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| 10% Admin costs | 0.5% QCTO Admin | 49.5% Discretionary grant | 20% Mandatory grant |

10. Mandatory/PIVOTAL Grant

The Mandatory Grant is intended as an incentive to organisations to plan and implement training for their employees and create training and work experience opportunities for employed and unemployed people in education and training programmes.

To be eligible for a Mandatory Grant, the employer must be a merSETA levy paying company and must submit a Workplace Skills Plan (WSP) and Annual Training Report (ATR)in the required format. The submission of the PIVOTAL Plan is not a compulsory requirement to benefit from the mandatory grant payment. However, it must be noted that if the company is a large or medium size company and intends to be considered for a discretionary grant, the PIVOTAL Plan must be submitted during the mandatory grant window.

The SDF is the person responsible for the submission and electronic sign-off of the mandatory grant application. In an organisation/s where a recognition agreement exists with labour/union, the labour/union representative is required to sign-off electronically on the mandatory grant application.

Where a recognition agreement does not exist, the employee representative from the training committee must sign off electronically for organisation/s employing 50 or more employees.

Refer to the merSETA Grant Policy for the requirements and criteria for submissions. Please note that the Grant Policy is approved by the merSETA Accounting Authority which consists of equal representation of organised business and organised labour representatives.

11. Discretionary Grant

The purpose of the discretionary grant is for the merSETA to ensure the implementation of the Sector Skills Plan (SSP). Discretionary grants are allocated at the *sole discretion* of the merSETA to achieve its objectives in relation to the development of the sector.

merSETA may consider awarding grants to merSETA organisations, if the organisation meets the following minimum criteria:

a. Submissions for large and medium companies occur during the mandatory grant application process, where the company would complete the PIVOTAL and Non PIVOTAL Plan in order to be considered for a discretionary grant award. Discretionary grant awards will only be considered where the mandatory grant application has been approved.

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Large and medium merSETA levy paying companies, that have not submitted PIVOTAL plans during the mandatory grant application process, will not be considered for discretionary grants for PIVOTAL programmes.

b.   The award is given via a MoA to the employer and other stakeholder entities, where the employer takes full responsibility for the learners.

c.   The MoA letter containing learning programmes must be shared with labour union

d.   The funds are distributed to the employer with specific deliverables and measurements which include the link to an accredited Public Education and Training Institution.

e.   Where no suitable Public Institutions exist, the employer may utilise the services of an accredited Private Provider. Public/Private partnerships will be encouraged.

f.   Where a company adheres to merSETA monitoring and quality assuring of the implementation of the learning programmes.

g.   Priority will be given to the priority skills identified in the merSETA Annual Performance Plan and SSP. (Refer to Annexure A attached)

h.   All claims must be in respect of learners who are South African citizens and who is in possession of a valid South African identity document.

i.   Further grant awards will be dependent on progression of previous grant awards.

j.   All withdrawals will be investigated to determine reasons for the withdrawal and how it could affect future discretionary grant awards.

k.   Where necessary, consideration will be given to progression of learners on learnerships.

l.   Learning programmes funded through the mandatory grant funding process will not be funded from discretionary grant funding.

m.   Large and medium organisations that are required to submit an Employment Equity Plan must indicate how the application for grants will contribute toward the organisation's Employment Equity Plan, per occupational category. No alignment between the grant application and the Employment Equity Plan could result in the non award of grants for PIVOTAL programmes.

12. Training Committee

12.1. Organisations with 50 or more employees must establish a Training Committee to ensure **active** participation on skills development matters. As stated previously, in the case of an organisation that has a recognition agreement with a trade union (s), immaterial of the size of the company, there must be evidence provided that the ATR, PR, WSP and PP have been subjected to consultation with the recognised trade union (s) and the ATR, PR, WSP and PP must be signed off electronically by the labour SDF appointed by the recognised trade union.

12.2. This committee is established for consultation purposes and to ensure that training is in line with the strategic plan and employment equity plan of the company it should therefore reflect the interest of employees from all occupational categories in the organisation's workforce.

12.3. For organisations that have a recognition agreement with a union in place; there must be evidence that submission of the ATR/WSP/PP and TR have been subjected to consultation with the recognised trade union.

12.4. Composition of the Training committee

All stakeholders should be included in the training committee, for example

- Labour SDF/Employee Representative (s)

- Employee Representatives from designated groups

- Non-designated groups

- Senior Management

- SDF

- Labour SDF / Secondary SDF

The frequency of consultative forum meetings will vary from organisation to organisation depending on size, sophistication and existing levels of diversity.

12.5. Scope and objectives of a training committee:

- a. Consultative Process
- b. Reflect interest of employees from all categories in workplace
- c. Compliance with legislation WSP, PP, ATR & PR
- d. Terms of Reference
- e. Support the Strategic Goals
- f. Monitoring
- g. Communication and feedback

Training Committee

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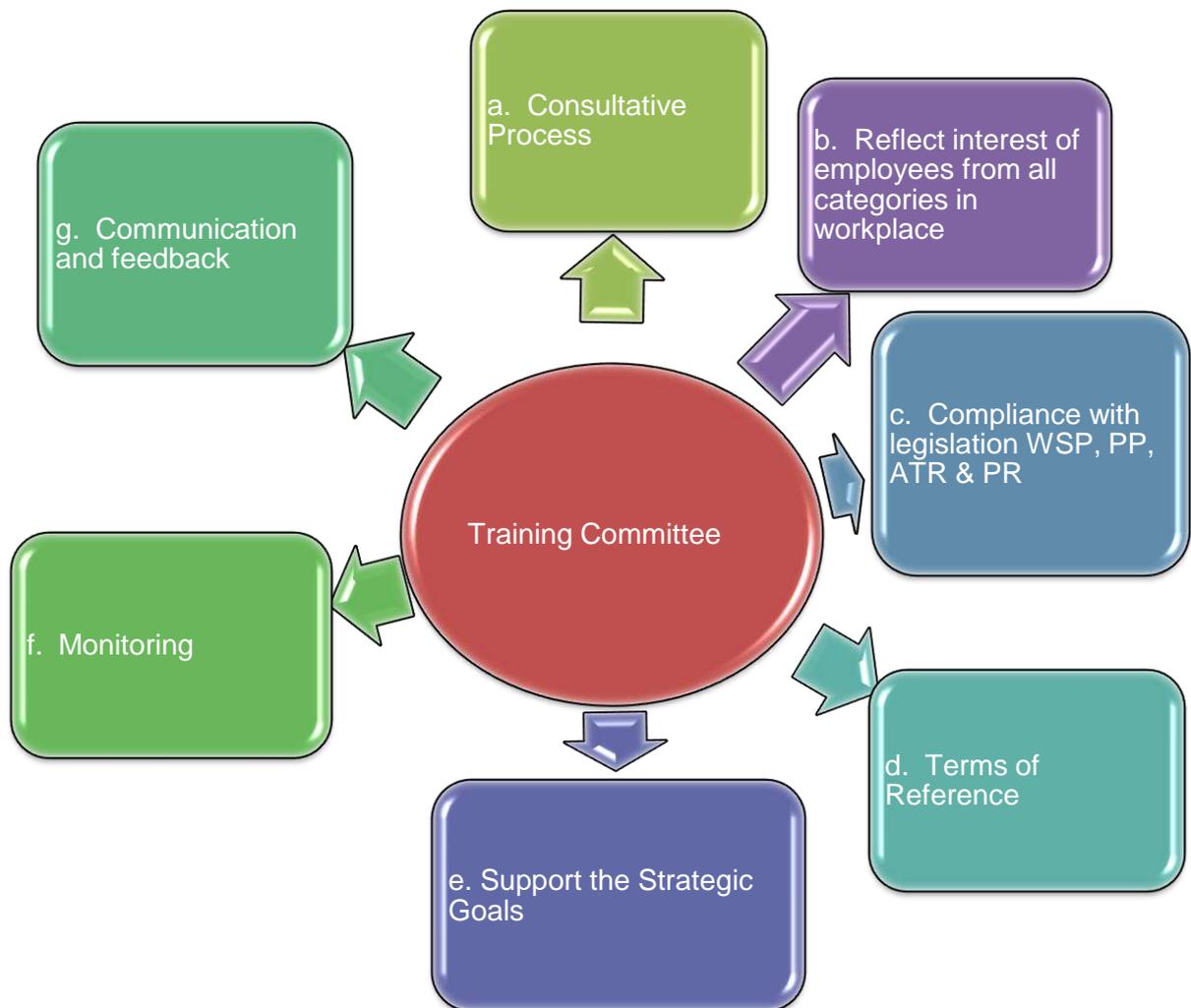
a. Consultation Process

An organisation cannot be prevented from continuing with the completion of a WSP, PP, ATR and PR in the event where the union does not concur/accept the information for the submission.

However consultation must take place prior to taking the final decision on the completion of workplace skills plans and PIVOTAL plans or the implementation reports (ATR and PIVOTAL Report). For this reason, all discussions with the Training Committee and any written documents pertaining to this process should be made available and be kept in a safe area for record purposes to avoid any express or implied suggestion that the organisation had already reached its decision before the conclusion of the process.

This information will be requested by the merSETA when a site investigation takes place where a dispute has been lodged or where the labour SDF/employee representative has not signed off.

Proper consultation includes:

- The opportunity for labour to meet and consult their respective constituency and report back to employees and management

- Reasonable opportunity for employee representatives to meet with the organisation

- In principle agreement on the identified training interventions as is provided for in the SETA Grant Regulation 5 (2)(f)

- The request, receipt and consideration of relevant information

- Adequate time being allowed for each of the above steps.

b. Terms of Reference

The committee is responsible for making recommendations to the leadership of the organisation, for example Senior Management. In order to carry out the task effectively, it is recommended that a Training Committee has terms of reference in place with the given mandate and should be performance driven to ensure commitment. (A guide is attached to this document: Refer to Annexure C)

c. Compliance with legislation

The first objective of the committee should be to understand and promote the objectives of the EEA, SDA and SDLA and any other pieces of legislation within the organisation in order to:

- Facilitate employee mobility through outcomes-based education and training

- Ensure transformation in the workplace

- Assist employees to use the workplace skills development as a mechanism to achieve nationally recognised unit standards and qualification training which has been identified as a need for the company to meet the objectives set out in the strategic plan

- Promote skills development in the organisation

- Enhance the organisation's performance with quality of education and training

- Optimise the levy rebates (grants), incentives and interventions supported by the SETA and SARS.

d. Support the Employer's Business Plan by:

- Developing the WSP and PP taking the skills and gap analysis into consideration to meet business priorities in order to meet the objectives of the organisation's strategic planand the alignment to the employment equity plan

- Proposing actions to continuously enhance the skills level of employees so that the business plan of the company can be met and that technology, processes and structural changes can be effectively implemented

- Promoting skills development relevant to the requirements of the organisation by assisting and advising on the development of competency levels of employees so that individual and team performance can be improved and the objectives of the Employment Equity Plan realised.

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e. Monitoring

It is important that the skills development facilitator keeps accurate training records and gives feedback on training. The Training Committee must regularly track the progress of training, identify problem areas and propose solutions.

f. Communication and Feedback
The committee should develop an effective feedback and communication process so that the training committee activities and progress are reported back to staff members and comments or concerns from staff members are taken into account at meetings.

13. Skills Needs Analysis

SUBMISSIONS OPEN 1 FEBRUARY AND CLOSE 30 APRIL

a. Organisation's Business Plan

b. Employment Equity Plan

c. Skills Audit

d. Skills Gap Anaylsis

e. Identify learning programme

f. Complete Workplace Skills Plan & PIVOTAL Plan

g Implementing and Reporting

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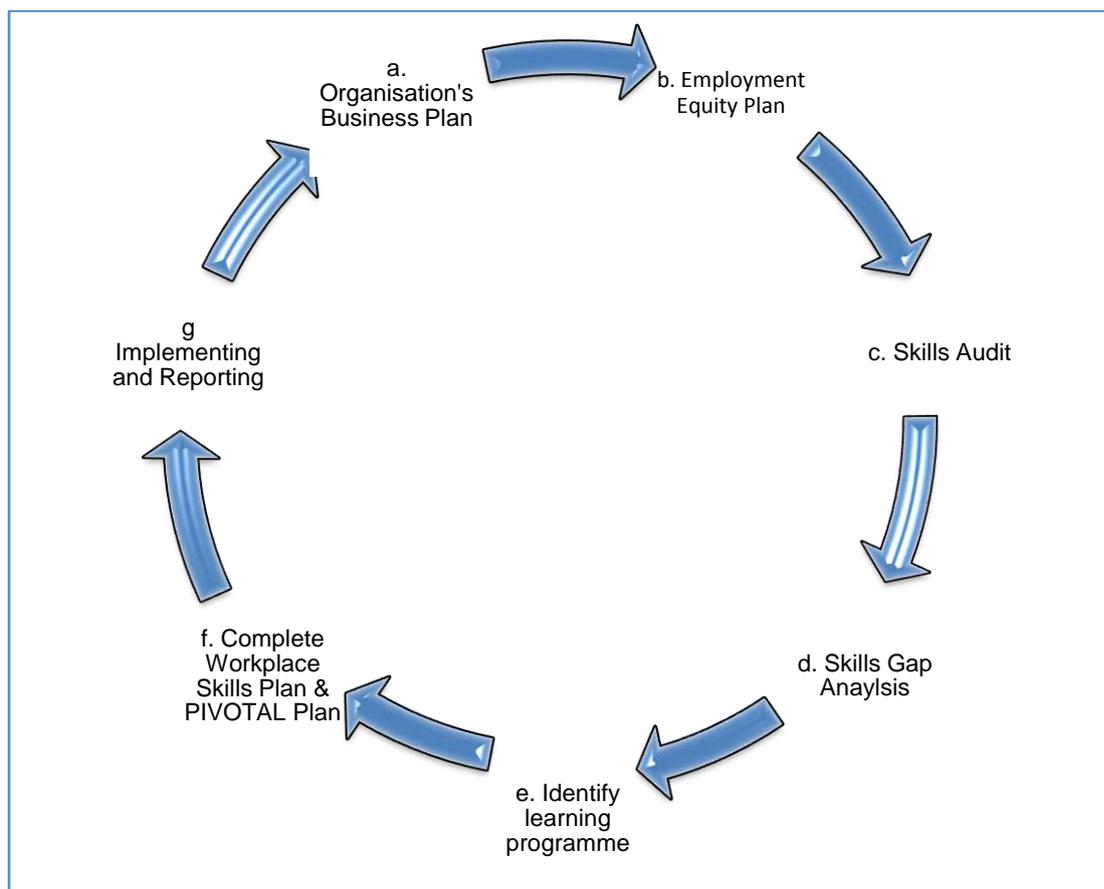
a. Organisation Business

Every successful organisation has a plan that sets out where it is going as an organisation and how it will get there.

The Business Plan would inform the human resource strategy in a company. The purposes of the Human Resource strategy should be to ensure that the organisation has the right number of people in the right jobs. Furthermore the strategy needs to ensure that the appropriate skills levels are developed to meet the business objectives.

The organisation's human strategic priorities for skills development linked to actual training interventions that are planned for implementation should include training and development needed to:

- Ensure the development of the business and the productivity of its employees
- Promote employee growth to other jobs
- Meet employment equity targets and,more importantly, ensure transformation in the organisation
- The training committee must have a clear understanding of the direction in which the business is going, and how it intends getting there.

b. Employment Equity Plan

Every designated employer is required to design and implement an employment equity plan. The purpose of the employment equity plan is to enable the employer "to achieve reasonable progress towards employment equity", to assist in eliminating unfair discrimination in the workplace, and to achieve equitable representation of employees from designated groups.

The purpose of the Employment Equity Act is to achieve equity in the workplace by:

- Promoting equal opportunity and fair treatment in employment through the prevention of unfair discrimination, and

- Implementing affirmative action measures to redress the disadvantages in employment experienced by designated groups, in order to ensure their equitable representation in all occupational categories and levels in the workplace.

Skills Development and Employment Equity

Skills development is a strategic mechanism to support the implementation of Employment Equity within an organisation. The Employment Equity Act clearly states that skills development is a key mechanism to provide for the advancement of the employees from the designated groups. It is therefore recommended that organisations adopt an integrated approach to employment equity and skills development.

c. Skills Audit:
The main purpose of conducting a skills audit is to identify the skills and knowledge that the organisation requires as well as the skills and knowledge the organisation currently has.

d. Skills Gap Analysis:
This is the outcome of the skills audit process. The information that is obtained will enable the organisation to compile a comprehensive and meaningful training needs analysis.

e. Identify the Learning Programmes:
Training programmes or assessments carried out, against the learning areas identified from the skills audit, should enable an individual to gain recognition on the NQF (National Qualifications Framework) towards a registered qualification.

f. Workplace Skills Plan and PIVOTAL Plan:
In order to prepare for the completion and submission of the WSP and the PP the above pre-work steps should have been completed. Then the following information would need to be gathered, analysed and discussed:

- Company Details

- Details of the Skills Development Facilitator

- Details of the Labour SDF/Employee representative

- Details of the Secondary SDF, if required

- Details of the training committee or consultative forum involved in the development of the WSP

- A total qualifications profile of all employees against the NQF levels

- Company strategic priorities

- Annual company skills development (education and training) priorities for current year

- The NQF level of planned skills priorities, i.e. the proposed level at which the programmes are aimed

- Beneficiaries of priority skills offered per occupational category, gender, race, age, disability and geographical spread

- Nature of learning interventions, i.e. in-house, external or formal education institutions

- Identify if the training programme will be submitted for discretionary grant consideration or mandatory grant payments.

g. Implementing a WSP and Reporting:
The organisation should keep records of all the training, activities, assessments and/or development initiatives implemented according to the WSP in preparation for preparing the ATR and PR.

The ATR and PR must list all the interventions that have been implemented according to the WSP. If training or other initiatives planned in the WSP were not completed, justification for this should be recorded.

merSETA will measure the achievements identified in the reports against the priorities outlined in the plans, with the intention of paying the employer the relevant grant if they have implemented the plan sufficiently.

14. Employed Learners

With reference to Section 18.1 of the SDA: where a worker is in the employment of the employer when the learner agreement is concluded, the worker's contract of employment is not affected by the agreement.

15. Conclusion

The information contained in this guide is intended to enhance understanding of the importance of the role of the labour SDF/employee representative within the training committee and the importance and process of compiling submissions and implementation of the mandatory and PIVOTAL plan and report.

Annexure A: Regional Offices

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Annexure B: Example: Terms of Reference

As a member of the Training Committee, I undertake:

To act at all times in the best interests of the company and all of its Employees and to approach my duties in a responsible and sensitive manner

To focus on objectives and not attempt to use the committee as a forum to address the interests of individuals or other parties

To act as a fully involved committee member, to attend all committee meetings and to recognise that this duty is included as a normal part of the planning and time management of my work for the company

To co-operate with management to prepare, implement and monitor an employment equity plan that provides clear, practical and reasonable targets and measures to overcome employment barriers for the designated groups and to increase diversity at all levels of the workforce

To co-operate with management to implement and monitor a Workplace Skills Plan that provides clear, practical and reasonable targets to improve job performance and productivity and to train and develop employees at all levels of the workforce

To represent, communicate with and gather feedback from employees and other stakeholders and to timeously table this feedback for discussion at committee meetings

To respect the sensitive and/or controversial nature of some of the information that will be disclosed by communicating it sensitively and within its context and by refraining from using such information to achieve other objectives

To recognise that while management is required to comply with the legislation, it has also decided to adopt a constructive and pro-active attitude towards its legislated duties

To recognise that while the Acts require management to consult and attempt to reach agreement, management reserves the right to make the final decision after due consideration of the recommendations of the Training Committee.

NAME: *SIGNATURE:*   *DATE*

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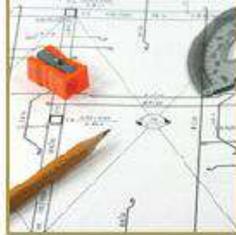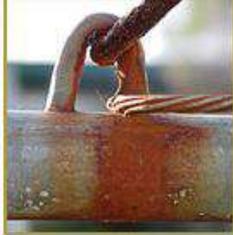
Skills Development Facilitators (SDF) Registration Manual

Skills Development Facilitators (SDF) Registration Manual

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1. Purpose of this Document

The purpose of this document is to assist the Skills Development Facilitator (SDF), Secondary Skills Development Facilitators and labour SDFs to register on the MERSETA SMS system in order to complete the WSP/ATR submissions.

a. <u>User Profiles</u>

NOTE: Only one (1) Primary SDF is permitted per Levy Number and the system is designed accordingly. However, to cater for a number of users per organisation on the system, the following user groups are available.

Skills Development Facilitator (SDF): Main SDF for the organisation even if there are other SDFs in the same organisation.

Secondary SDFs: To cater for the users who are not the primary SDF for the organisation, who wish to have access to merSETA SMS, and need to register as a **secondary SDF.**

The secondary SDFprofile allows users to have view access to the system.

merSETA Labour SDF: merSETA contracted SDF who provides support to organizations within the Manufacturing, Engineering and Related Services sector particularly for small organisations.

REGISTER AS A NEW SKILLS DEVELOPMENT FACILITATOR

1

Enter the following url address: Enter the seta name that you want to visit

http://196.4.89.14/cdas/merseta.asp

You will land on the logon page. Click on "Register as a Skills Development Facilitator"

Register as a Skills Development Facilitator

Enter your personal information

Surname

Note: Select your SDF Type at the top of the screen

SDF Type:

SDF
Secondary SDF
Labour SDF

2

Click on Enter to save your details

Once you have created your username and password, you will receive an email to confirm that you are now registered as a SDF

You are now registered as a SDF

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Note: SDF Details – "Role of SDF"

A Skills Development Facilitator (SDF) is responsible for: -
- Assisting the organisation to develop the Workplace Skills Plan (WSP);
- Advising the Organisation on the implementation of the WSP;
- Assisting the Organisation to draft the Annual Training Report (ATR);
- Advising the Organisation of any quality standards set by the Sector Education and Training Authority (SETA);
- Acting as a contact person between the Organisation and the SETA;
- Advising and supporting the Training Committee (particularly in medium or large organisations);
- Serving as a resource with regard to all aspects of skills development within the sector.

2. Access SDF Registration

To access the Registration Forms, the following steps need to be followed:

Step 1: Via the internet enter the following URL http://196.4.89.14/cdas/MERSETA.asp

Step 2: This link will take you to the MERSETA SMS Logon page. Follow the steps in section 3 to start with the registration process.

3. Register as a new Skills Development Facilitator (SDF)

This is the process that the SDF follow to register themselves in order to be able to access the system. However, before the SDF can access the system ,they need to be accepted by the merSETA Administrator

*For every new organisation the SDF registers/ links to their profile, the SDF must send an appointment letter from the employer/ organisation, stating that the organisation has appointed you as the organisation's SDF.

Step 1: Click on the link "Register as a Skills Development Facilitator", below the username/password boxes in the link.

Click on the "**Register as a Skills Development Facilitator**" icon

Register as a Skills Development Facilitator

Step 2: This link will open the first page of the registration form which needs to be completed:

Start by selecting the SDF type from the dropdown list:

The SDF type list is in the form of a dropdown list with the following values:

- SDF (Skills Development Facilitator)
- merSETA Secondary SDF (Skills Development Facilitator)
- Labour SDF (Secondary Skills Development Facilitator)

You can register for only one of the above mentioned types.

Step 3: Complete the "**Personal Details**" section

Personal Details:

Surname	First Name	Initials	Title

Non-SA Citizen (For statistical purposes only)
☐

ID Number	(For statistical purposes only)		
	Gender	Population Group	Disabled
			☐

Highest Level of Education	
Job Title	
Current Occupation	

Experience relevant to Skills Development Facilitator

Experience	Description of Experience	Duration of experience in years

Contact Details	Cell Phone Number	e.g. 082 555 5555
	Telephone Number	e.g. (011) 555 5555
	Alternative Telephone Number	e.g. (011) 555 5555
	Fax Number	e.g. (011) 555 5555
	E-Mail Address	

Postal Address		City		
		Postal Code	Province	

Physical Address		City		
		Postal Code	Province	

Other:

SDF Training:
Have you completed an SDF Training Programme provided by an accredited training provider? ☐
If Yes, Name of Accredited Training Provider:
Year of Training:
Certificate Number:

Please choose your own Username & Password

Username	(Minimum of 5 Characters)
Password	(Minimum of 5 Characters)
Confirm Password	

Enter

Please note that **ALL** the fields are compulsory and need to be completed accurately.

Step 4: Complete the SDF training section under "**Other**"
In this section you need to indicate whether you have completed the SDF Training Programme with an Accredited Training Provider, the year you undertook the training and provide your certificate number.

All the fields under the SDF training section become compulsory when you select the tick box. You do not need to complete this section if you have not completed any SDF training.

Registration of Skills Development Facilitator
Please refer to Annexures of Regulation 103 to the Skills Development Act
(Act No. 97 of 1998)

SDF Type:			

Personal Details:

Surname	First Name	Initials	Title
temp	teste	t	Ms.

Non-SA Citizen (For statistical purposes only)

☐

ID Number	(For statistical purposes only)		
	Gender	Population Group	Disabled
Invalid South African ID Number 8006250616083	Female	African	☐

Highest Level of Education	test
Job Title	test
Current Occupation	111201 – Managing Editor

Contact Details	Cell Phone Number	0000000000	e.g. 082 555 5555
	Telephone Number	0000000000	e.g. (011) 555 5555
	Alternative Telephone Number		e.g. (011) 555 5555
	Fax Number	0000000000	e.g. (011) 555 5555
	E-Mail Address	tmotsatsi@dtss.co.za	

Postal Address	test	City	test		
		Postal Code	0000	Province	Gauteng

Physical Address	☑ (Tick if physical address same as postal address)				
	test	City	test		
		Postal Code	0000	Province	Gauteng

Rank:	

Other:

SDF Training: Have you completed an SDF Training Programme provided by an accredited training provider?	☐
	If Yes, Name of Accredited Training Provider
	Year of Training:
	Certificate Number:

Please note that your Username is your ID number & your Password is your surname plus the first 6 digits of your id number [eg. Botes890512] as provided above	
Username	test@1
Password	•••••••
Confirm Password	•••••••

Enter

Step 5: Entering a Username and Password:

Registration of Skills Development Facilitator
Please refer to Annexures of Regulation 103 to the Skills Development Act
(Act No. 97 of 1998)

SDF Type:	

Personal Details:

Surname	First Name	Initials	Title
temp	teste	t	Ms.

Non-SA Citizen (For statistical purposes only)

☐

ID Number	(For statistical purposes only)		
	Gender	Population Group	Disabled
Invalid South African ID Number 8006250616083	Female	African	☐

Highest Level of Education	test
Job Title	test
Current Occupation	111201 - Managing Editor

Contact Details	Cell Phone Number	0000000000	e.g. 082 555 5555
	Telephone Number	0000000000	e.g. (011) 555 5555
	Alternative Telephone Number		e.g. (011) 555 5555
	Fax Number	0000000000	e.g. (011) 555 5555
	E-Mail Address	tmotsatsi@dtss.co.za	

Postal Address	test	City	test		
		Postal Code	0000	Province	Gauteng

Physical Address	☑ (Tick if physical address same as postal address)				
	test	City	test		
		Postal Code	0000	Province	Gauteng

Rank:

Other:

SDF Training:
Have you completed an SDF Training Programme provided by an accredited training provider? ☐

If Yes, Name of Accredited Training Provider [ ]
Year of Training: [ ]
Certificate Number: [ ]

Please note that your Username is your ID number & your Password is your surname plus the first 6 digits of your id number [eg. Botes890512] as provided above

Username	test@1
Password	●●●●●●
Confirm Password	●●●●●●

[Enter]

The username and password which the SDF enters on the personal details page does not give the SDF access to the organisation's details. This allows the user to enter unique logon details and not system-generated user logon details. The logon details will only be active when the SDF has been approved by the merSETA administrators. This username and password will assist you to complete the application for registration only.

Very Important: You are responsible for any actions that occur on the system when logged on with your username and password. **Do not** share your logon details, as any changes made will be audited via your details. Only once your SDF registration application form has been approved by merSETA will you be able to access the organisation details for mandatory grant purposes.

Step 6: Click on the "**Enter**" button to save the information supplied and captured to this point and to move on to the next step of Registration.

The system will give you notification that the first phase of your SDF registration application was successful in the form of an acknowledgement e-mail. This however does not mean that you are able to access the details of the organisation as the administrators at merSETA still need to confirm your application for the specific organisation.

This page can be copied to Microsoft Word for future reference.

The below details can be printed out to keep on file for future reference. To print these details, you need to click on the "**Print**" button at the bottom of the page.

Registration of Skills Development Facilitator
Please refer to Annexures of Regulation 103 to the Skills Development Act
(Act No. 97 of 1998)

APPLICATION FOR SDF REGISTRATION: PHASE 1

Details:

SDF Name:	Ms. Thabang Motsatsi
ID Number:	8410221606087
Gender:	Female
Population Group:	African
Username:	8410221606087
Password:	Motsatsi841022
SETA:	MerSETA

The first phase of your SDF registration was successful. Please note you have to link yourself to the relevant organization/s.
When you have completed the SDF registration form on SMS, print it and obtain the necessary signatures. Please upload the scanned form on SMS. If this process is unsuccessful please send the signed SDF registration form to the MERSETA by fax. Please ensure that you keep the signed original on file.

The person details for this user already exists and is displayed on the screen for information purposes.

Please click on the 'Register an Organisation' button to register one or more organisations or the cancel button to register an organisation later.

Print   Cancel   Register an Organisation

Step 1 of 2   SDF Registration

4. Link organisaion to your profile

After successful registration, you need to link your profile to the organisation(s), for which you will perform the SDF function. Once merSETA has approved your application, you will have access to the organisation's information as well as the templates to submit mandatory grant applications.

Follow the next steps:

Step 1: Click on the "Register an Organisation" button on the same page above (highlighted in red) as the details given when Registration was successful.

Step 2: The following page will open:

You need to have the SDL numbers of the companies that you are going to act as an SDF for.

Add the SDL number to the "**SDL Number**" field.

list of companies- Applied for or registered and approved against.

Step 3: Complete the information requested in Section 2: Organisation Details:

Note that this information is only pertaining to the specific company that you added the SDL number for. You need to complete this information for each company that you are going to link to your profile.

Step 4: Below Section 2, is Section 3: Authorisation. Please ensure that you complete this section as it will pull through to the Authorisation form that you are going to print after registration and which needs to be submitted to merSETA.

Step 5: Save the information captured by clicking on the "**Enter**" button, left bottom corner.

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This will trigger an e-mail to the Skills Development Administration Unit at merSETA to inform them that there is a new registration on merSETA SMS.

The system will now add this company to your profile.

#	Organisation Name	SDL Number	Registration Status	Options
1.	A new Test	T000000011	Pending	✕

[Print]

[Finished]

Should you need to link more companies to your profile, follow steps 2 to 6 for all companies to be added

Should you need to remove the company from your profile you can click on the "**Remove**" icon - ✕

Step 6: Print the Authorisation Form

Once all companies have been linked to your profile, you can click on the "**Print**" button.

Register one or more organisations

SDL Number: [   ]

[Add]

#	Organisation Name	SDL Number	Registration Status	Options
1.	Test Organisation	T000000001	Pending	✕

[Print]

[Finished]

This function will download the Authorisation form that needs to be signed by the parties that were captured on Section 3: Authorisation.

To print this form from the website; you need to click on the "**Print**" button

Skills Development Facilitator

SKILLS DEVELOPMENT FACILITATOR

Title	First Name	Initials	Surname
Mr.	Tester	t	Test

ID Number	Gender	Population Group	Disabled
8001011234098	Female	Indian	☐

SA / Non SA (For statistical use only)

☐

Highest Level of Education

123

Job Title

123

OFO Occupation

Group Manager

OFO Code

111201

Experience relevant to Skills Development Facilitator

Description of Experience	Duration of experience in years
1	1

Telephone Number	Cell Phone Number	Alternate Telephone Number
0113451234	08278900988	

Fax Number	E-Mail Address
0112340987	ekleingeld@dtss.co.za

Note: Organisation details reflected below are from the Organisation main page on I-Share. Should information be incorrect please rectify once approved by MQA as registered SDF for the specific organisation.

ORGANISATION DETAILS

Organisation Name:

Test Organisation

Organisation Registration No:

Test Organisation

SDL Number:

T000000001

Phone Number:

Fax Number:

SIC Code:

21000

SIC Code Description:

Mining of Coal and Lignite

Payroll

R 0.00

Number of Employees:

50

Financial year:

Postal Address:

Unknown

Unknown

Unknown

Physical Address:

Unknown

Unknown

Unknown

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Authorisation Form   **T000000001**

The authorisation confirms that a senior representative in the organisation authorises the appointment of the SDF. This is proof that the employer signatories certify the accuracy of the information in the SDF registration form. The MQA reserves the right to independently verify information supplied. In the case of medium and large organisations, the Skills Development Committee must be consulted.

Authorised Signatory (Senior Organisation Represenattive)

Name of Authorised Signatory (Senior Organisation Represenattive):	Henriette Nortje
Designation / Position in Organisation:	SDF
Contact Details: Cellphone:	0980987098
Fax:	0980980987
E-Mail:	ekleingeld@dtss.co.za
Date:	_____
Signed Authorised Signatory:	_____

Name of SDF:	Henriette Nortje
Designation / Position in Organisation:	SDF
Contact Details: Cellphone:	0980987890
Fax:	0980987098
E-Mail:	ekleingeld@dtss.co.za
SDF Type:	
Date:	_____
Signed SDF:	_____

Note: This section is compulsory for Medium and Large Organisations

On behalf of the Skills Development Committee

Name (Employer representative):

Designation / Position in Organisation:

This form can also be copied to Word for a neater format. To do this you need to click on the "**Copy to Word document**" option.

You will get the following message:

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Click on the "**OK**" button. Open a blank Word document and paste the form using one of the following ways:

- Right click and select "Paste", or
- Select "Paste" from the Edit Menu, or
- Use the "Ctrl + V" keys on your keyboard.

This form then needs to be signed by the relevant parties, scanned in and attached it to your profile, as reflected on the next page of this document. You need to scan the document to attach it to your profile.

You can close this form on SMS when you have completed the printing/copying to Word. This will take you back to the screen where you registered the organisation by clicking on the "**Finish**" button. This will close the registration session and take you back to themerSETA SMS logon screen.

Should you experience difficulties with this process, you can e-mail the documentation to tradetest@merseta.org.za:

5. ACCESSING THE SYSTEM

Once the SDF has received notification from the merSETA that they have been accepted as SDF for the companies that they have registered for; only then can the SDF access the system.

To access the system, the user must be connected to the internet. The user must enter the following URL into the system: http://196.4.89.14/cdas/merseta.asp

Fill in your usernameand password and, select Skills – Current Year under the Logon to dropdown.

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Click on the "Enter" button.

Click yes and this will take you through to the SDF dashboard.

On this dashboard the following can be done/viewed:

- Register or Remove an Employer
    - **OR** to upload Authorisation form as in Step 8 in Section 4 above
- Edit Skills Development Facilitator's details
- Access companies listed on Profile
    - **NOTE**: you will only be able to access the company's details when the "**Access**" status is "**Accepted**". When the status shows "**Pending**" the merSETA has not processed your application as yet.

Should you experience difficulties with this process, you can either e-mail the documentation to tradetest@merseta.or.za or fax it to:

Claudi Fraser   -   0866704881 for company names between A – F
Tessa Grobler   -   0866704986 for company names between G – O
DaleneRadyn   -   0866704888 for company names between P – Z

Please ensure that you keep the signed original document on file.

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The screen displays the following information:

- The organisations which the SDF has linked themselves to.
- The organisation SDL number.
- Whether or not the user has access to the specific organisation's details.
- The Plan grant column displays the WSP and ATR status for that specific financial year.
- The Due date- this column displays the WSP and ATR due date for that financial year.

The implementation Grant and the Due date column next to it, were mainly used for the NSDS 1 period where the organisations would submit the WSP and ATR information separately. These two columns are inactive in NSDS 2

- ## **Register or remove an Employer**

  - **Step 1:** Click on the "Register or Remove an Employer".

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Step 2: To remove an employer click on the red cross under "**Options**"

ADD / REMOVE AN ORGANISATION

Instructions:

1. Add an organisation to the list by entering the organisations SDL Number and select the ADD button.

2. You may remove any organisation from the list by selecting the REMOVE icon.

3. Once you have finished adding all the organisations to your SDF profile, click the 🏠 icon.

SDL Number: [   ]

[ADD]

#	Organisation Name	SDL Number	Registration Status	Options	Registration Form
1.	Test Organisation	T000000001	Rejected	✕	...

Page 1 of 1   Records 1 to 1 of 1   Goto page 1 ⌄ GO

[Print]

Note: A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organisations workplace skills plan.

Step 3: To Add an Employer fill in the L number in the "**SDL Number**" field and click on the "**Add**" button.

Step 4: Upload Authorisation Form

Next to each company which you have linked yourself to, there is a button in the "Registration Form" column. .

#	Organisation Name	SDL Number	Registration Status	Options	Registration Form
1.	A new Test	T000000011	Pending	✕	...
2.	Demo	X000000040	Approved	✕	...

Page 1 of 1   Records 1 to 2 of 2   Goto page 1 ⌄ GO

You need to upload an Authorisation form per company. To do that, you need to click on [...] . This will open an upload screen.

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Document	[ ]	Browse...
	Please upload only MS WORD documents	
Registration Form Contents	No Documents Found	

Click on "**Browse**" and upload your form.

Step 5: Once you have finished adding all the organisations to your profile, click on
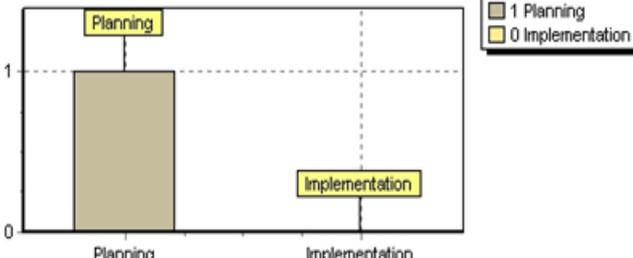
the "**Home**" icon

6. Edit the Skills Development Facilitator's details

Step 1: Click on "**Edit Skills Development Facilitator's Details**"

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The following screen will appear.

Step 2: Change the information.

Step 3: Click on the "**Enter**" button at the bottom of the page.

Step 4: Once you have finished adding all the organisations to your profile, click on

the "**Home**" icon

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Notes:

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